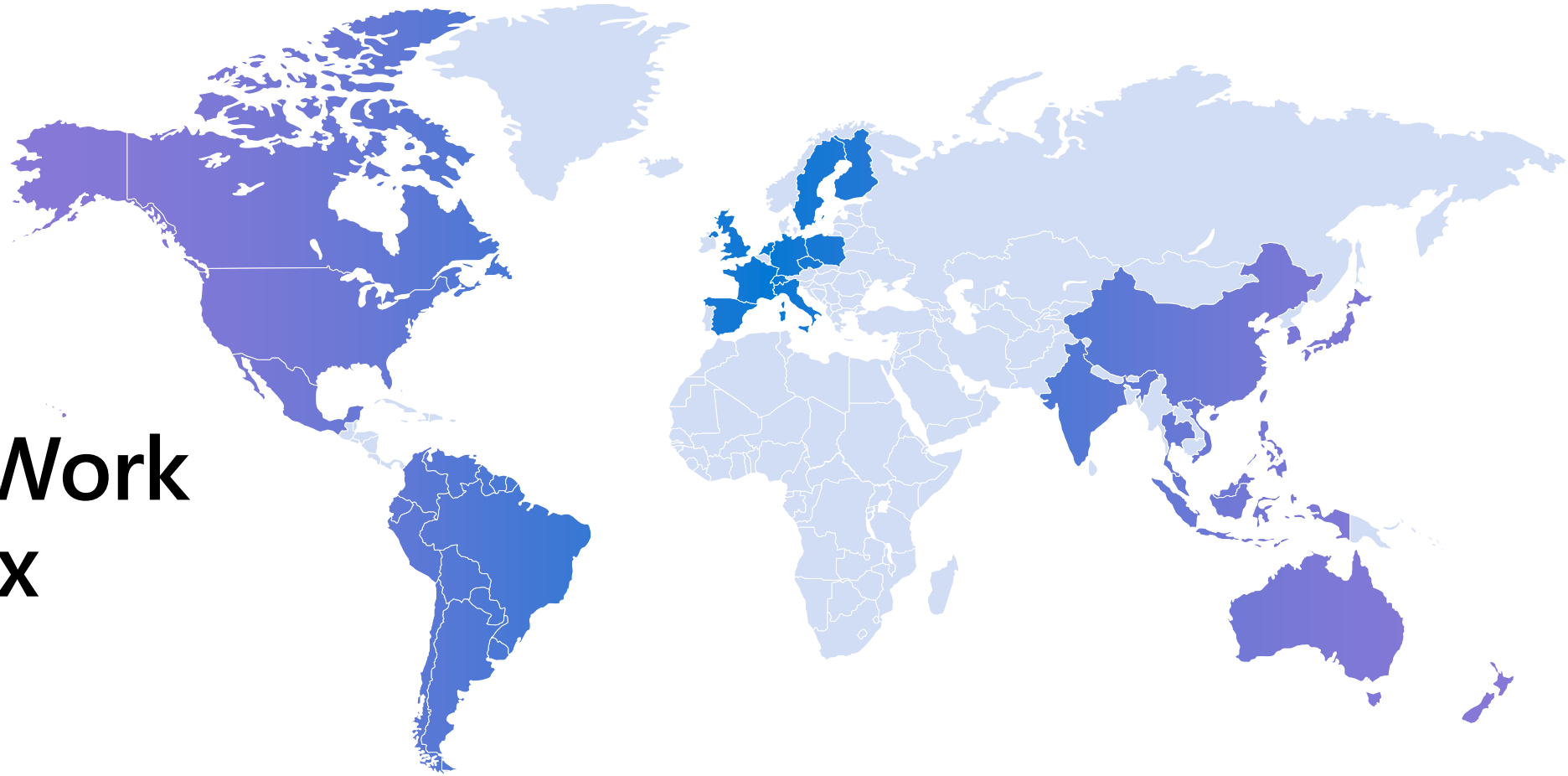
Microsoft

Microsoft 365 Copilot

# Drive Business Transformation with Copilot

Chris Williams
**Microsoft Channel Manager – Modern Workplace**

storm technologies



# Microsoft Work Trend Index

http://aka.ms/wti

**31,000** people | **31** countries | Microsoft 365, LinkedIn, Glint People Science + academic research

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# Copilot for Microsoft 365 is transforming work

**64%**

of people have struggled with finding time and energy to get their work done

**62%**

spend too much time searching for information during the workday

**60%**

of leaders say a lack of innovation or breakthrough ideas is a concern

**70%**

said Copilot made them more productive

**68%**

said Copilot improved the quality of their work

**77%**

said they didn't want to give Copilot up

Work trend Index Annual Report: Will AI Fix Work? Microsoft. 9 May 2023 | Microsoft Work Trend Index: What can Copilot's Earliest Users Teach Us About Generative AI at Work?: Microsoft. 15 November 2023

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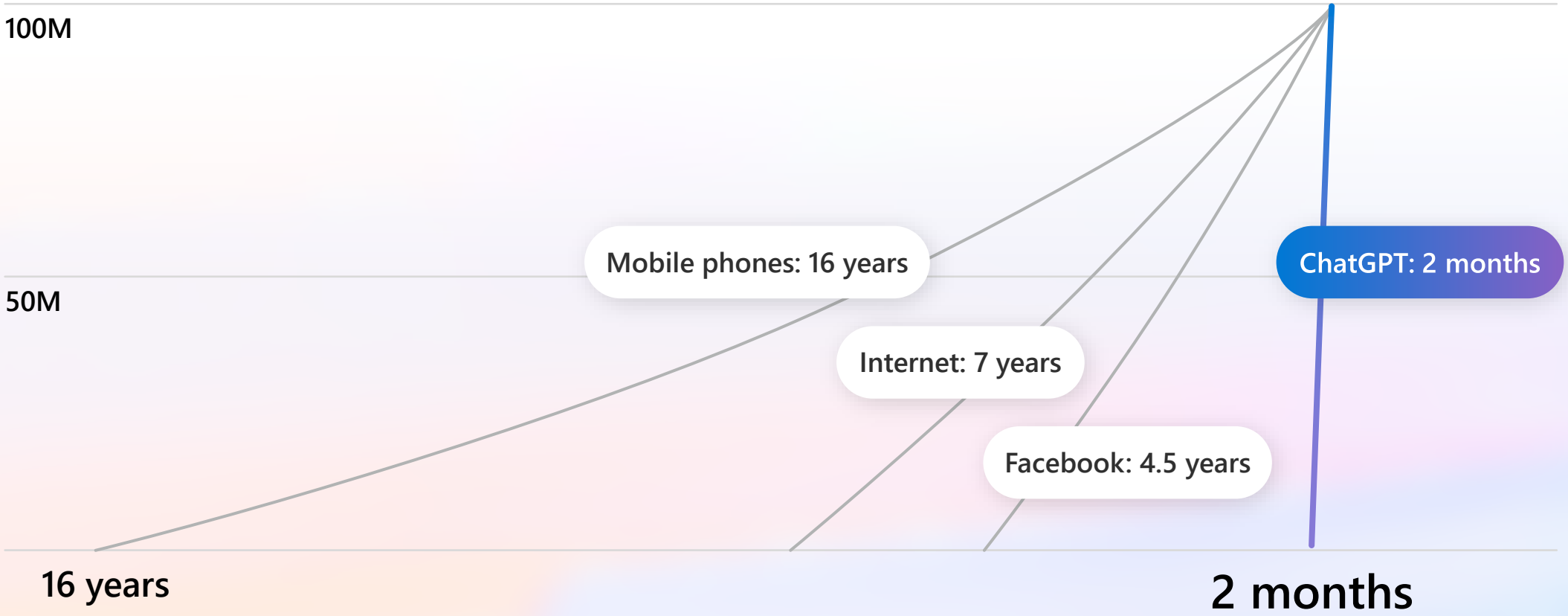
# Generative AI technology is here

## Time to reach 100M users




Source: Microsoft Research

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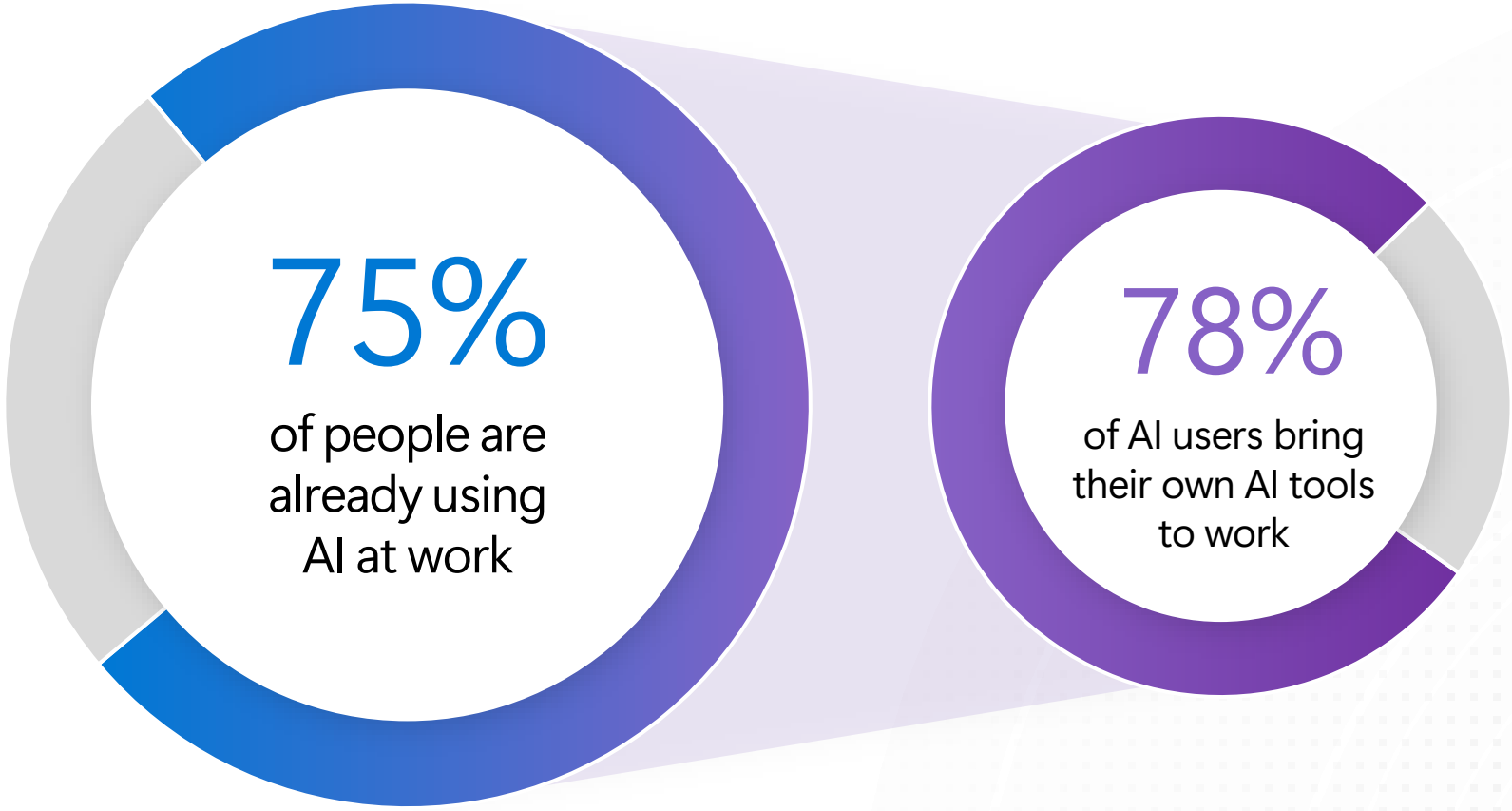
# AI has come to work




2024 Work Trend Index Annual Report from Microsoft and LinkedIn: AI at Work Is Here. Now Comes the Hard Part

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# Employee usage is high – but leadership is lagging

**79%**

of leaders believe AI is a business imperative to stay competitive,...

...a surprising

**60%**

say their organization lacks a plan and vision to implement it,...

...and

**59%**

worry about quantifying the productivity gains of AI.

2024 Work Trend Index Annual Report from Microsoft and LinkedIn: AI at Work Is Here. Now Comes the Hard Part

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# The age of Copilots has arrived.

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Alexis Blackwell
ArcE Vol.10
Brooklyn, NY

# Microsoft 365 Copilot

Your AI assistant for work

## Natural Language

Large Language Models

+

Microsoft Graph - Your Data -

+

Microsoft 365 Apps

+

The Internet

Enterprise-grade security, privacy, and compliance

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# Microsoft 365 Copilot

Your AI assistant for work

Natural Language

Enterprise-grade security, privacy, and compliance

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# Microsoft 365 Copilot

Your AI assistant for work

## Natural Language

Security + Compliance + Privacy + Responsible AI

Enterprise-grade security, privacy, and compliance

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# Microsoft 365 Copilot is the AI assistant you can trust

## Security

Honors your existing permissions

Persistent label inheritance and DLP policies

Risk-based conditional access and endpoint management

## Governance & Compliance

Ramp your data preparedness for AI

Detect and investigate non-compliant usage

Guided assistance to remain compliant with AI regulations

## Privacy

You control your data

You control your data location

Your data isn't used to train foundation models

Your Microsoft 365 security, governance, compliance, and privacy policies

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Draft with Copilot

Old version Doc: Policy v1.docx, New version Doc: Policy v2.docx Compare the old and new versions of the document provided. Highlight and describe the differences between the two versions. Pay attention to changes in text, formatting, and any additional content. Provide a detailed analysis of the modifications, specifying additions, deletions, and modifications. If possible, categorize the changes into sections such as content, structure, or style. Your analysis should be thorough and informative, allowing for a comprehensive understanding of the differences between the old and new documents.

599 / 2000

Generate

Reference your content

# Insurance Claim Template

A form to collect information from the customer about their claim

## Customer Details

| | |
|---|---|
| Customer Name | [Response] |
| Address | [Response] |
| Phone Number | [Response] |
| Email Address | [Response] |
| Policy Number | [Response] |
| Claim Number | [Response] |

## Claim Details

| | |
|---|---|
| Date and time of the incident: | [Response] |
| Location of the incident: | [Response] |
| Description of the incident: | [Response] |
| Type of claim (e.g. property, vehicle, personal injury, etc.): | [Response] |
| Estimated amount of damage or loss: | [Response] |
| Photos or documents to support the claim (if available): | [Response] |
| Any witnesses (if applicable): | [Response] |
| contact details, and insurance information (if applicable) of the "other party" involved in the accident | [Response] |

# Microsoft 365 Copilot agents

Classified as

# What are Copilot agents?

**Copilot agents are AI assistants that can help optimize business processes and enhance productivity**

**Copilot agents vary in level of complexity and capabilities depending on your need**

Simple → Advanced

## Retrieval

**Retrieve information** from grounding data, reason, summarize, and answer user questions

**Generally available**

## Task

**Take actions when asked**, automate workflows, and replace repetitive tasks for users

**Generally available**

## Autonomous

**Operate independently**, dynamically plan, orchestrate other agents, learn and escalate

**Coming soon**

Classified as

# Spectrum of Copilot agents

**IT Helpdesk agent**

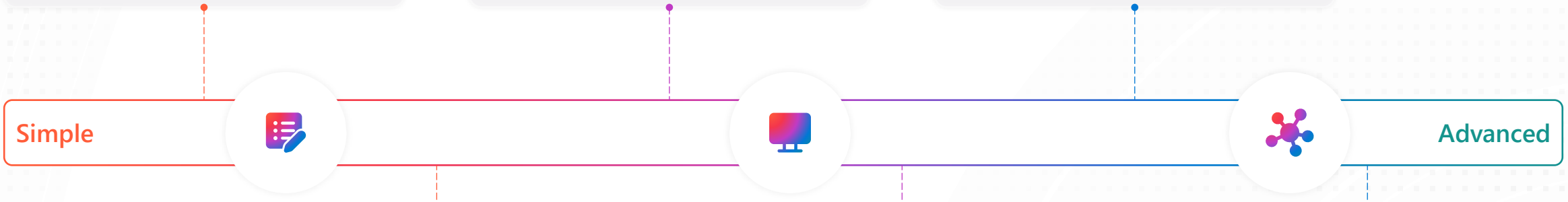
How do I connect to the corporate network?

**Device Refresh agent**

Request a new laptop and send approvals via IT Service tool.

**Lead Gen agent**

The agent has identified and researched 15 new leads for you to review.




**Project Tracker agent**

What is the status of phase 2 for project X and the remaining budget?

**Expense Report agent**

Review outstanding open purchase orders and begin financial planning.

**Customer Support agent**

The agent identified new support issues and triaged to multi-agents to handle.

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# Building Copilot agents with Copilot Studio

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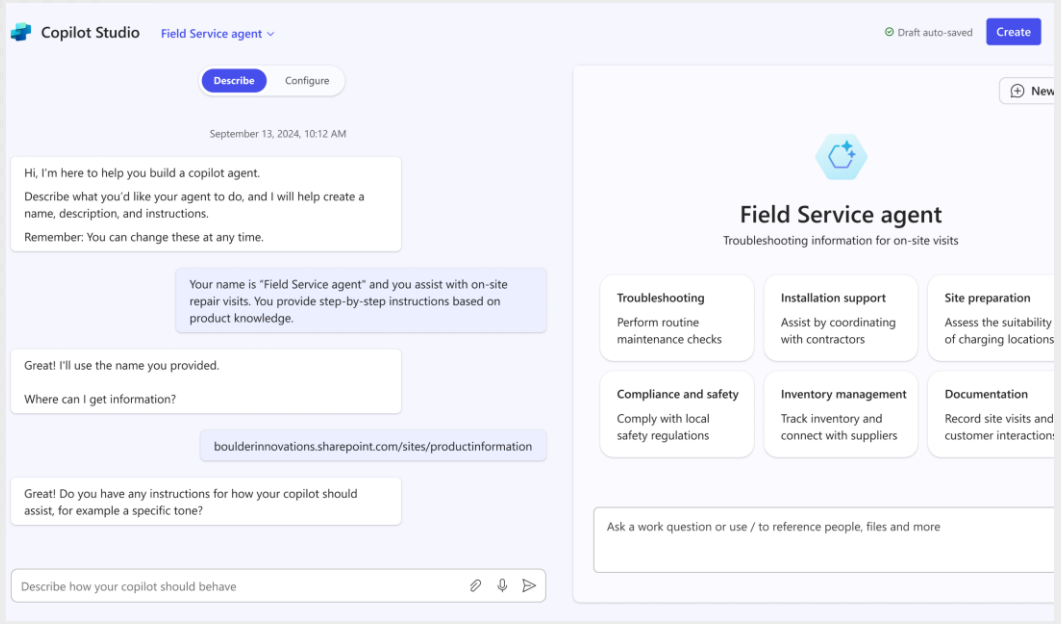
# Copilot Studio

Copilot Studio is the platform to **build Copilot agents** that **extend Microsoft 365 Copilot** or **operate standalone**

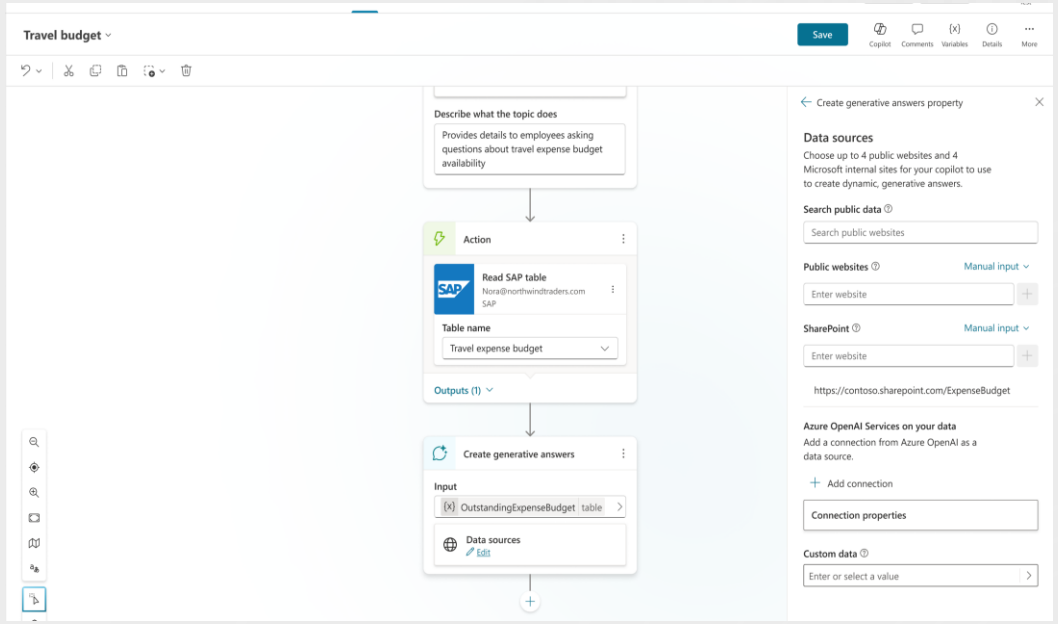
## For end users




### Copilot Studio agent builder

in Microsoft 365 Copilot BizChat and SharePoint

## For IT & developers




### Copilot Studio

Full featured graphical authoring environment



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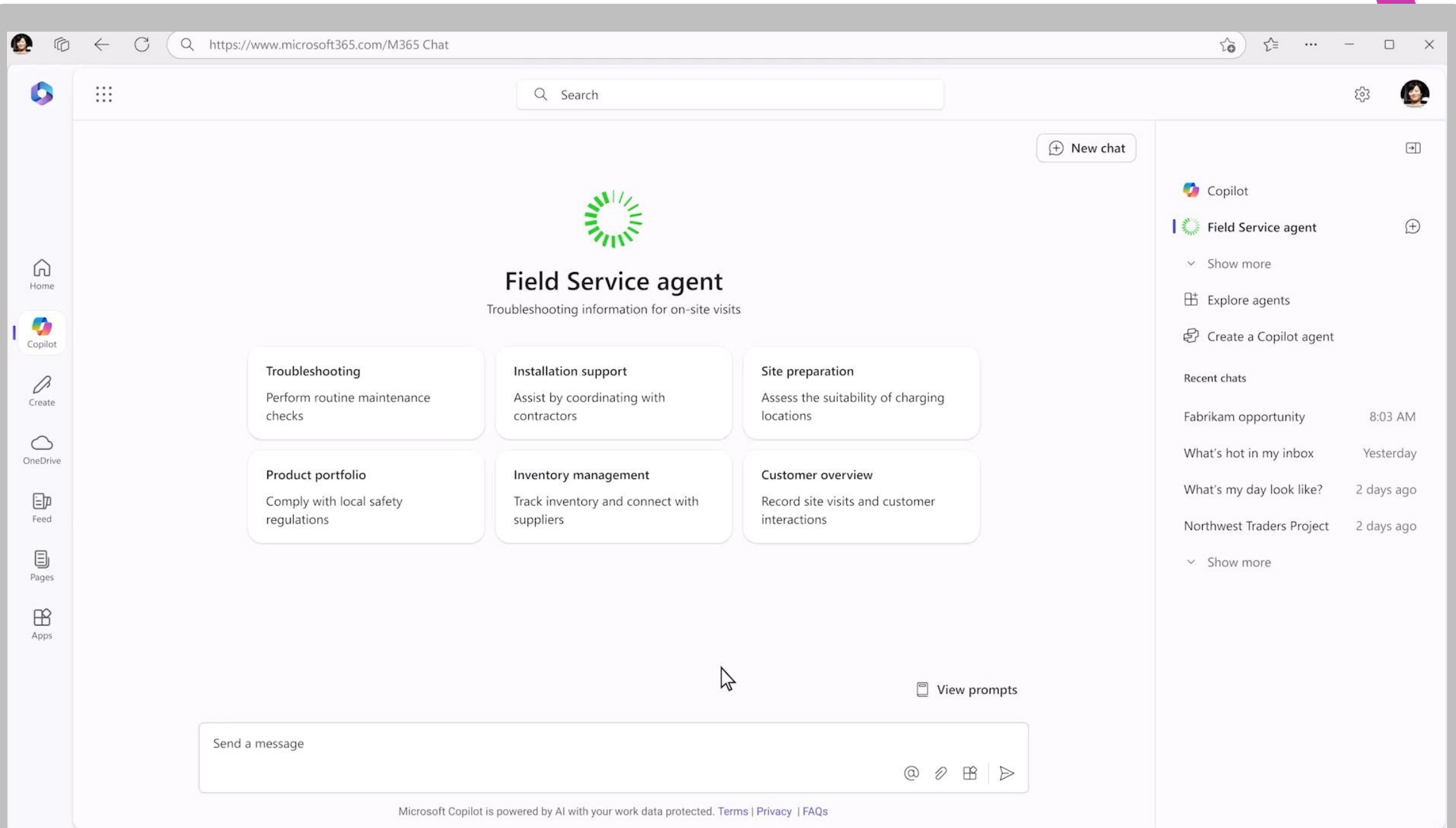
https://www.microsoft365.com/M365 Chat
Search
New chat
Home
Copilot
Create
OneDrive
Feed
Pages
Apps
Field Service agent
Troubleshooting information for on-site visits
Troubleshooting
Perform routine maintenance checks
Installation support
Assist by coordinating with contractors
Site preparation
Assess the suitability of charging locations
Product portfolio
Comply with local safety regulations
Inventory management
Track inventory and connect with suppliers
Customer overview
Record site visits and customer interactions
View prompts
Send a message
Microsoft Copilot is powered by AI with your work data protected. Terms | Privacy | FAQs
Copilot
Field Service agent
Show more
Explore agents
Create a Copilot agent
Recent chats
Fabrikam opportunity 8:03 AM
What's hot in my inbox Yesterday
What's my day look like? 2 days ago
Northwest Traders Project 2 days ago
Show more

# 3 Essentials for Copilot Success

## Leadership

Develop leadership capabilities to leverage AI for business outcomes

- Executive sponsorship
- Align AI to business strategy
- Providing clarity and prioritization
- **Best practice:** AI Council

## Human change

Manage the human transformation with robust user enablement programs

- User enablement program
- Communications and community
- Skilling and training
- **Best practice:** Community of Practice and Copilot Dashboard

## Technical readiness

Build and iterate technical skills to deliver on business results

- Secure your data infrastructure
- Policy review
- Extend to new high-value line of business scenarios
- **Best practice:** Optimization Assessment

**Responsible AI principles**

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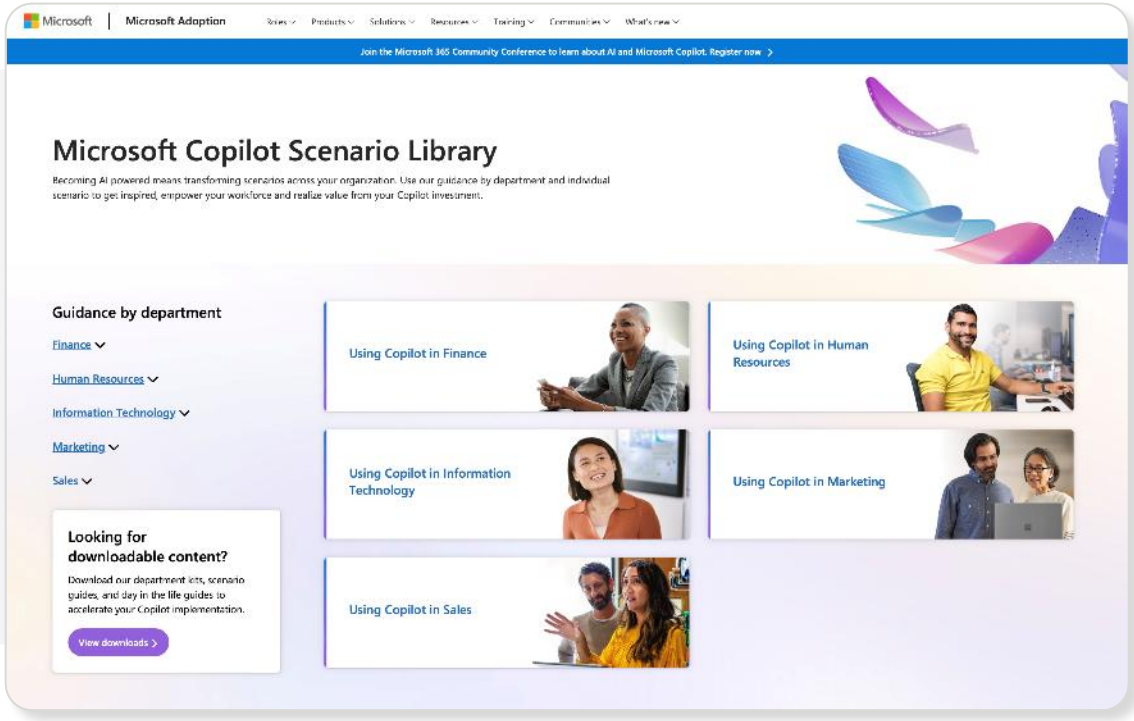
Human Change

# Bring AI value across lines of business

## Copilot Scenario Library

Use the **Scenario Library** to identify top use cases and key metrics you would like to improve in that functional area.




**All roles & execs**
- Improve meetings
- Content creation
- Manage daily agenda

**HR**
- Cost per hire
- Employee turnover
- Compliance risk reduction

**Marketing**
- Leads created
- Brand value
- Cost per lead

**Operations**
- Customer retention
- Product time to market
- Supply chain efficiencies

**IT**
- Outstanding support tickets
- Application downtime
- Departmental spending

**Sales**
- Number of opportunities
- Close rate
- Revenue per sale

**Finance**
- Accelerate cash flow
- Spend on ERP system
- Risk reduction

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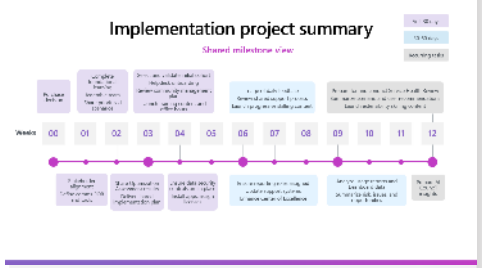
Human Change

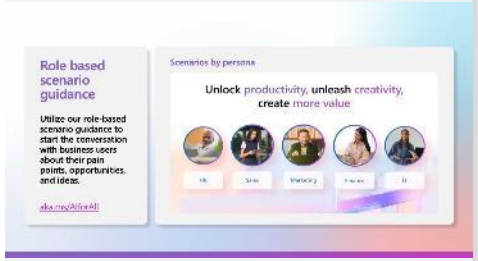
# Copilot Success Kit to assist with change management

## Implementation summary guide



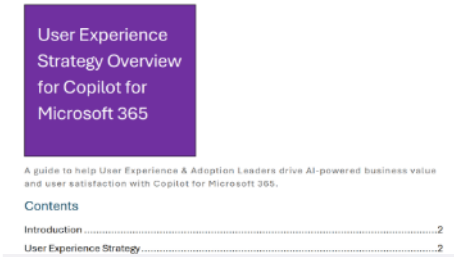

Business Leaders

## User Enablement Guide




HR leaders, Change Management teams

## User Experience Strategy




User Experience and Adoption leaders

## Accelerate AI value with Microsoft Viva

IT, L&D, Corp Comms, Analysts and End users

https://aka.ms/CopilotSuccessKit

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Technical Readiness

# Copilot Readiness Assessment

**Objective:** Provide Microsoft partners and customers with Copilot readiness assessments designed to facilitate Copilot adoption by providing customers with an overall Copilot readiness score based on the organization's current security posture, user licensing, and usage of Microsoft applications

## Block64 Scan and Zero Trust Questionnaire

- Collects information regarding the organization's current security policies and practices via a Zero Trust Questionnaire.
- Block64 connects to the organization's Microsoft Cloud Portal data to collect information on Secure Scores, current licensing, and usage across Teams, OneDrive, and SharePoint.

## Readiness Metrics

- **Security:** Provides a Security Score based on the average of 3 inputs: approximate Zero Trust Maturity Score, Azure Secure Score, and M365 Secure Score, and provides recommendations to improve in all 3 areas.
- **Licensing:** Provides a Licensing Score based on the percentage of users who are currently licensed with a prerequisite Microsoft products and recommends licensing upgrades for remaining users.
- **Optimization:** Provides an Optimization Score based on the percentage of active users today with Teams, OneDrive, and SharePoint and provides recommendation on increasing adoption of these tools.

## Copilot Readiness Report

The Block64 tool will produce the Copilot Readiness Assessment Report within a few hours of deployment, after which, the SMB Desk consultant will review the findings of the report with you and your customer to discuss current Copilot readiness status and recommended actions to prepare for Copilot adoption.

Technical Readiness

# Copilot Readiness Assessment

## Copilot Readiness
### Summary of Findings

Your environment's readiness for Copilot has been graded based on data collected from your M365 portal and your Azure portal.

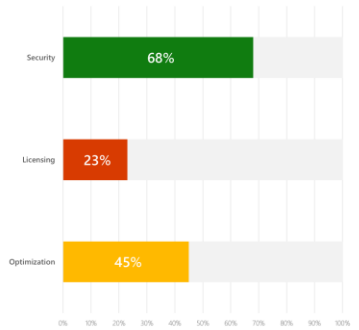
**Security**: 13 SharePoint sites were found being accessed by 25 groups

**Licensing**: 0 Users are already licensed for Copilot

**Optimization**: 35 Users aren't using the complete Office suite

The following slides outline how to increase readiness in all three areas.

Microsoft




## Security
### Security Applications

Across your environment, we identified:

1. 4 Threat Protection tools
2. 2 Security Management tools
3. 1 Information Protection tools
4. 1 Systems Management tools
5. 1 Identity Protection tools

Microsoft 365 E5 provides functionality across these 5 categories that could assist in consolidation.

Microsoft

| Threat Protection | Security Management | Information Protection | Systems Management | |
|---|---|---|---|---|
| Crowdstrike | Netskope | Mimecast | Microsoft | ExpressVPN |
| Microsoft | SolarWinds | | | |
| Symantec | | | | |
| Malwarebytes | | | | |
| $104,128 spent per year | $83,703 spent per year | $27,552 spent per year | $0 spent per year | $400 spent per year |

## Optimization
### Productivity Tool Adoption

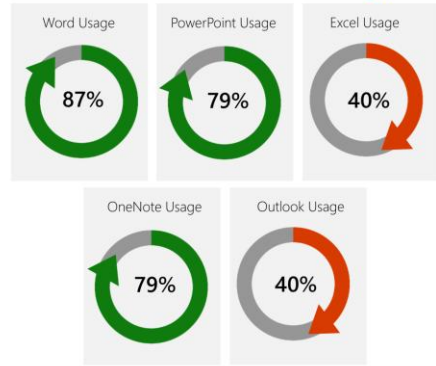
Evidence found in your environment suggests Copilot could offer time savings for your teams.

In the past 30 days:

1. 254 users accessed Word
2. 231 users accessed PowerPoint
3. 117 users accessed Excel
4. 231 users accessed OneNote
5. 117 users accessed Outlook

Based on a Microsoft study, users experienced an average of 1.2 hours saved per week through Copilot use.

Microsoft



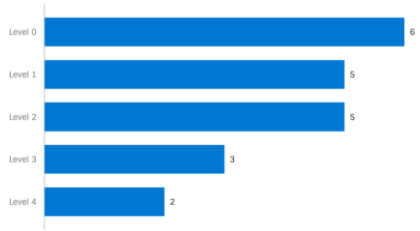

## Security
### Sensitivity Labels

We scanned your OneDrive and SharePoint environments for sensitivity labels

1. 115 Files were found with assigned sensitivity labels
2. 7 Different levels of sensitivity labels were found in use

Consider widespread adoption of Sensitivity Labels to ensure that data cannot be accessed by unauthorized users.

Microsoft



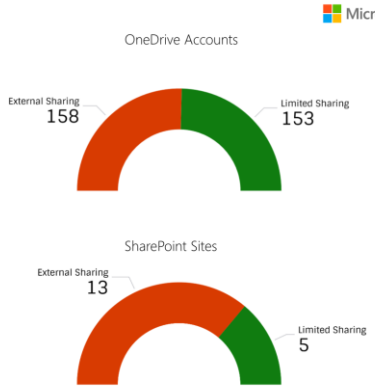

## Security
### External Sharing and External User

In SharePoint, external sharing was enabled for 13 of your 18 sites.

In OneDrive, external sharing was enabled for 158 of your 311 users.

External Users:
7 users were found who can access company resources with a different domain that require extra attention.

Microsoft




## Security
### Groups and Access

There were 7 top level sites found in your SharePoint, and 16 user departments had access to these sites.

Review the groups with access to each site to ensure accuracy of access levels.

Microsoft

| SharePoint Sites | User Groups with Access |
|---|---|
| Sales | Business Development, Sales, Sales Managers |
| Finance | Management, Controllers, Legal Team, Kiosk Staff |
| IT | Sysadmins, Help Desk, Networking |
| Marketing | Management, Marketing, Sysadmins |
| Legal | Legal Team, Management, Help Desk, Maintenance |
| Operations | Consultants, Project Managers, Legal Team |
| HR | Human Resources, Management |

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# How do you get started?

- Get started with Copilot for the web (Formerly Bing Chat Enterprise)
- Understand file permissions & loss prevention policies, explore through assessments
- AI Strategy: Learn how AI is creating a whole new way of working
- Adoption Strategy: Leverage Resources for Adoption for your Copilot roadmap

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Microsoft 365

# Thank you

*Questions*

storm technologies